

U. S. SECURITIES AND EXCHANGE COMMISSION

Investigation # A-04060

DECLARATION OF JOSEPH MORGAN

Pursuant to 28 U.S.C. Section 1746, the undersigned states as follows:

1. My name is Joseph Morgan I am over twenty-one years of age and have personal knowledge of the matters set forth herein.
2. I am assigned as an IT Specialist to the U.S. Securities and Exchange Commission's Division of Enforcement in Washington, D.C. As part of my duties I have been trained to preserve various forms of online content. For investigation # A-04060 I have been tasked to conduct a Website Capture/Video Capture/Social Media/Telegram/Live Stream/Blog.
3. In support of investigation number # A-04060, and at the direction of my supervisor, I was tasked to conduct an internet preservation of the following URL.

<https://driveplanning.com/>

4. I completed the above mentioned internet preservation on, February 12, 2024, using the following tools:

Adobe Acrobat Pro / Google Chrome Browser / WebPreserver

The above listed tools are commonly used to preserve internet content.

5. I saved the above-mentioned internet preservation using FTK Imager, which ensures that the internet preservation will not be altered or modified during storage. Specifically, FTK Imager forensically seals the internet preservation such that it can be opened only with FTK Imager. The sealed internet preservation has been labeled # A-04060 and saved to the following location:

K:\Other_Projects\Webcaptures\imagefiles

6. I also saved a copy of the above mentioned internet preservation along with this declaration to a network share. The location for this network share is provided below:

\\ad.sec.gov\ENFDataExchange\HQtoARO_dropoff\Webcapture

I declare under penalty of perjury that the foregoing is true, correct, and made in good faith.

Joseph Morgan

[Analyst Name]

Executed on this 12th day of February 2024.

EXHIBIT 1



About ▾ How We Help ▾ Events Videos

Financial GPS

Book a Call



— CEO/FOUNDER

TODD BURKHALTER

Atlanta • St. Petersburg

REAL Loan Application

CORE Fund Application



Todd Burkhalter's Bio

The past 25 years of my career has been spent consulting with business owners regarding how their business finances intersect with their personal finances; Drive Planning is designed to serve our clients in a fresh and even better way. Drive Planning is a culmination of my years of education in business. Within just a few hours our process provides a new confidence to our Members regarding their personal financial state, as well as a definitive plan for the future. A new lens for creating Contractual Wealth provides a predictable and understandable prescription for future success.



Contact Info



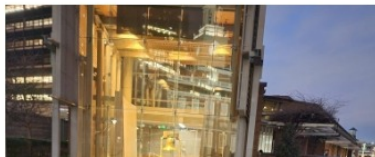
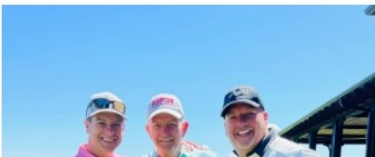
(404) 429-4132



todd.burkhalter@driveplanning.com



Linkedin.com/in/toddburkhalter/



URL

<https://driveplanning.com/todd-burkhalter/>

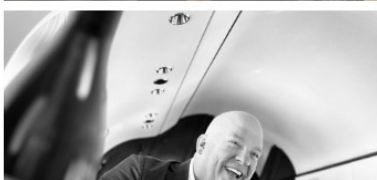
Timestamp

Mon Feb 12 2024 14:37:15 GMT-0500 (Eastern Standard Time)

even better way. Drive Planning is a culmination of my years of education in business. Within just a few hours our process provides a new confidence to our Members regarding their personal financial state, as well as a definitive plan for the future. A new lens for creating Contractual Wealth provides a predictable and understandable prescription for future success.



Linkedin.com/in/toddburkhalter/



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Work History

- **Chief Executive Office – Drive Planning**
2014 – Present
- **Contributing Author – Financial Planning Magazine**
2012 – Present
- **Catalyst Wealth Management – Managing Partner**
1997 – 2013



Interests

- Family
- Traveling
- College Football
- Golfing



CONTACT US

Name *(Required)*

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Alpharetta, GA 30009

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8100 106th St, Suite 260
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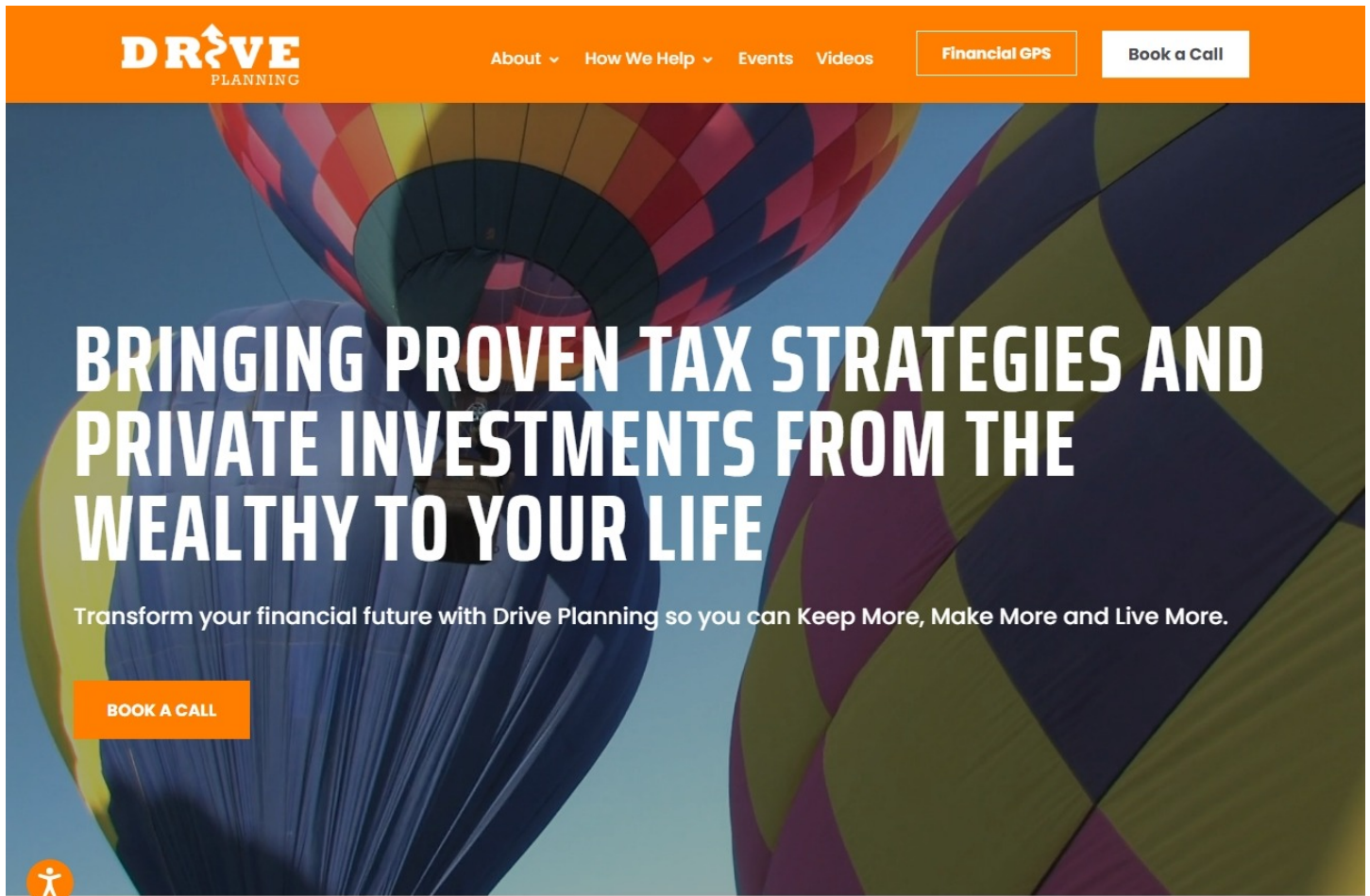
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EXHIBIT 2

The image shows the top portion of the Drive Planning website. The header is orange with the 'DRIVE PLANNING' logo on the left. Navigation links include 'About', 'How We Help', 'Events', and 'Videos'. Two buttons are on the right: 'Financial GPS' and 'Book a Call'. The hero section features a background image of hot air balloons. Large white text reads 'BRINGING PROVEN TAX STRATEGIES AND PRIVATE INVESTMENTS FROM THE WEALTHY TO YOUR LIFE'. Below this, a smaller line of text says 'Transform your financial future with Drive Planning so you can Keep More, Make More and Live More.' An orange 'BOOK A CALL' button is positioned on the left side of the hero section. A small orange icon of a person is in the bottom left corner of the hero section.

DRIVE
PLANNING

About ▾ How We Help ▾ Events Videos


Financial GPS

Book a Call

BRINGING PROVEN TAX STRATEGIES AND PRIVATE INVESTMENTS FROM THE WEALTHY TO YOUR LIFE

Transform your financial future with Drive Planning so you can Keep More, Make More and Live More.

BOOK A CALL



ABOUT US —

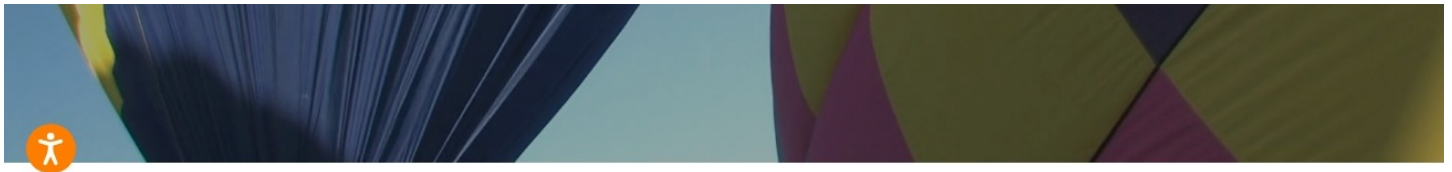
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At Drive Planning we are a comprehensive financial group



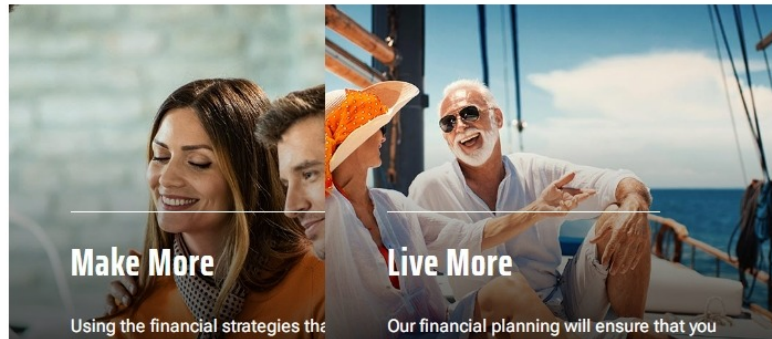
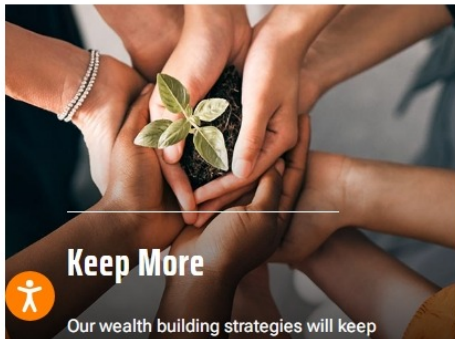
ABOUT US —

OUR PHILOSOPHY

At Drive Planning we are a comprehensive financial group. We understand that investments and financial planning can feel overwhelming, that's why we want to guide you in your journey to a successful financial future.

Our personalized approach to financial planning tailors our strategies to your unique needs. We will walk alongside you and together we will craft a plan that suits your goals and gets you excited about your future.

BOOK A CALL

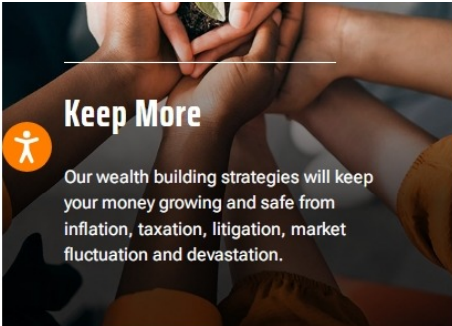


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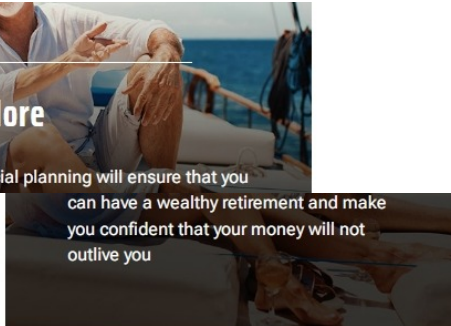
Keep More

Our wealth building strategies will keep your money growing and safe from inflation, taxation, litigation, market fluctuation and devastation.



Make More

Using the financial strategies that extremely wealthy have used for decades, we will create a plan for you to make more with your money.




Live More


Our financial planning will ensure that you can have a wealthy retirement and make you confident that your money will not outlive you

FEATURED OPPORTUNITIES

EXPLORE OUR PRIVATE INVESTMENTS

Get more control over your financial life by choosing an investment that aligns with your goals. Our private investments bring you the opportunity to invest in short, mid or long-term investments.






THE REAL ESTATE ACCELERATION LOAN

Insured loans which are backed by real estate colatera


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THE CORE FUND

Cash Out Real Estate Fund through Tax Liens

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RENEWABLE ENERGY FUND

Low-risk, first position debts secured by a PPA.

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— EARLY ACCESS

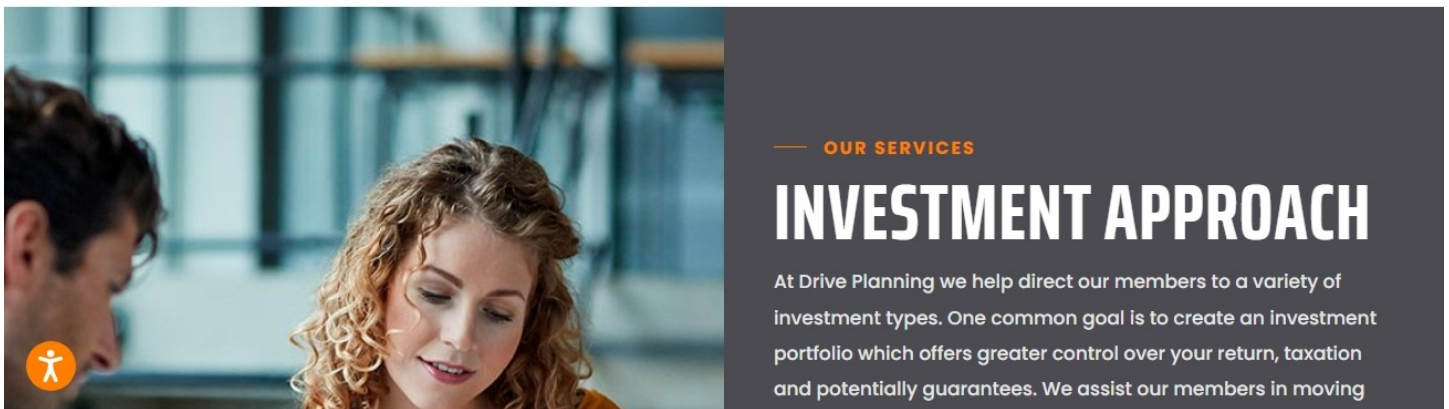
REGISTER FOR OUR NEWSLETTER!

Sign up to learn more about our latest news and get exclusive early access to new investment opportunities.

Name

Email

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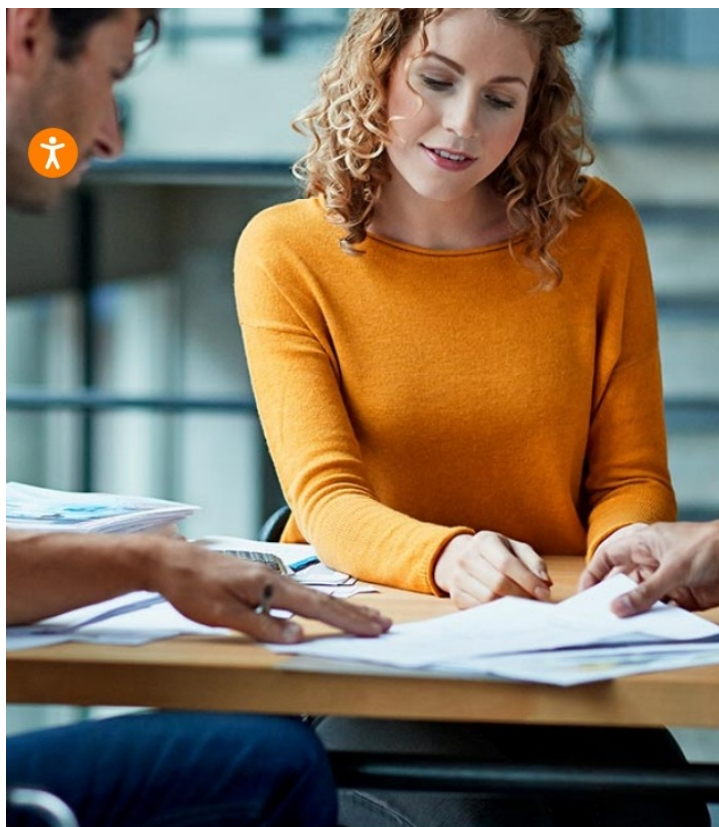


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INVESTMENT APPROACH

At Drive Planning we help direct our members to a variety of investment types. One common goal is to create an investment portfolio which offers greater control over your return, taxation and potentially guarantees. We assist our members in moving away from Statement Wealth and into more Contractual Wealth arrangements. Our investment portfolio consists of traditional stocks and bonds but goes well beyond Wall Street with offerings such as energy projects, real estate, storage units, film and television, CBD Oil and other business opportunities.

BOOK A CALL

2,527

Happy Clients

15+

Investment Opportunities

OUR SERVICES

TAX SERVICES



Many accountants focus on solely reporting the results and offering very little strategic advice. We believe that significant tax savings comes through planning which

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TAX SERVICES

Many accountants focus on solely reporting the results and offering very little strategic advice. We believe that many accountants focus on solely reporting the results and offering very little strategic advice. We believe that significant tax savings comes through planning which utilizes the entire tax code. This type of planning is often reserved for the super wealthy, not any longer. Drive Planning is bringing strategic tax saving moves to your financial plan.

BOOK A CALL

The image shows a collage of tax forms. On the left is a portion of Form 1040, U.S. Individual Income Tax Return, showing sections for Filing Status, Personal Information, and Income. In the center is Form W-4, Employee's Tax Statement, showing Step 1: Enter Personal Information. On the right is Form W-9, Taxpayer Identification Number (TIN) Statement, showing the top section for Name and TIN. A calculator and a pen are also visible in the collage.

STAY IN THE KNOW

WHAT'S NEW WITH DRIVE PLANNING



RACE CAR TEAM

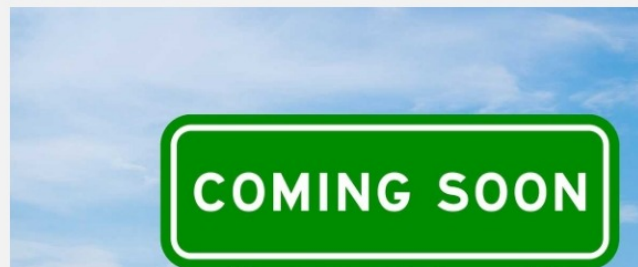
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DRIVE PLANNING FISHERS, IN





RACE CAR TEAM

Drive Planning is sponsoring Indy Car #67 with driver Elliot Cox for the Sarah Fisher Hartman Racing Team.

[LEARN MORE](#)



DRIVE PLANNING FISHERS, IN

Come Winter 2023 Drive Planning will be opening a new office in Fishers, IN! Serving Fishers, Indianapolis and surrounding areas, our brand new state of the art office will become a hub for financial literacy and events.

[LEARN MORE](#)

OUR PROCESS

HOW WE WORK

1. FINANCIAL GPS

We start by gathering your data so that we can better understand your financial life.

2. FINANCIAL MODEL

We input your data into a financial model and uncover red flags and opportunities.

3. WORKING TOGETHER

Armed with knowledge of your financial life, we start working together to ensure that you make the right



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3. WORKING TOGETHER

Armed with knowledge of your financial life, we start working together to ensure that you make the right financial moves to guarantee a better future.

[BOOK A CALL](#)



CAREERS

START A CAREER AT DRIVE PLANNING

We are continuously looking for great people to join our Drive Planning Team. We have a number of career options and training to support seasoned veterans all the way to career changers. Take a few minutes to learn more about our firm and how you may be a fit.

[APPLY NOW](#)



CAUSES AND ORGANIZATIONS WE SUPPORT

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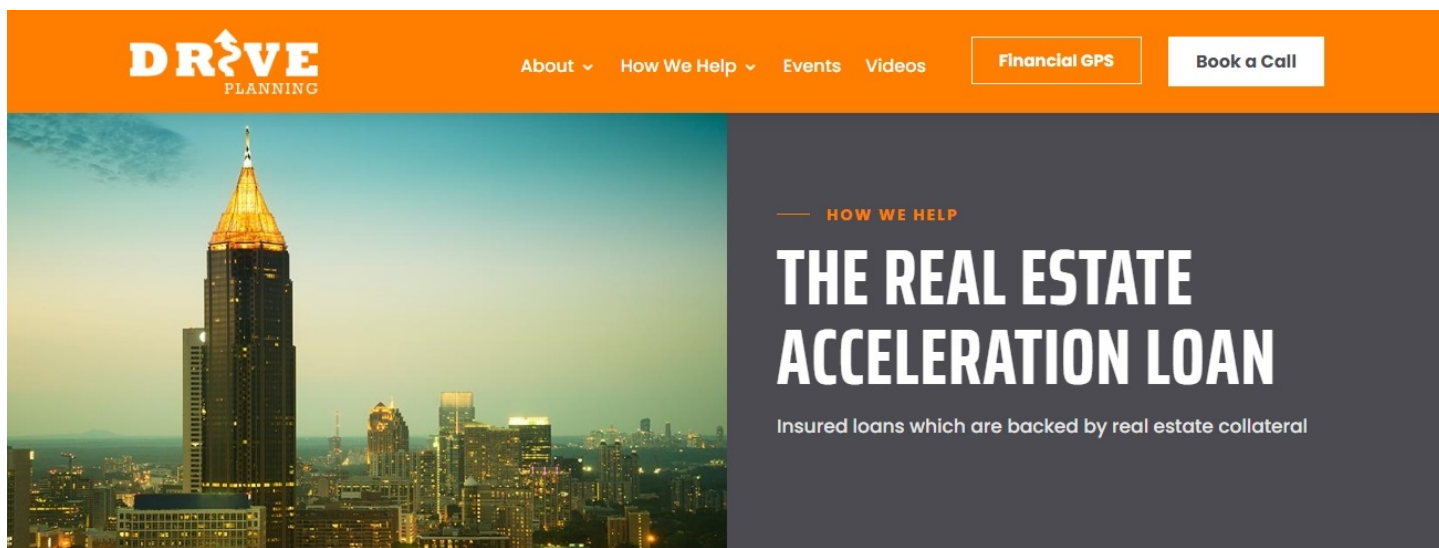
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EXHIBIT 3



This opportunity allows you to participate in real estate development with established companies. This opportunity is secured with real property as collateral.

Try our [investment calculator](#) to see how your investment would grow over time.



DOWNLOAD BROCHURE



COMPANY

Privately Held



MINIMUM INVESTMENT

\$20,000



RATE OF RETURN*

10% ROR



HOLDING PERIOD

3 Months

*Collateralized with Real Estate Security Deed and Cash

URL

<https://driveplanning.com/private-investments/the-real-estate-acceleration-loan/>

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Try our [investment calculator](#) to see how your investment would grow over time.



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MINIMUM INVESTMENT

\$20,000



RATE OF RETURN*

10% ROR



HOLDING PERIOD

3 Months

*Collateralized with Real Estate Security Deed and Cash

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EXPLORE OUR PRIVATE INVESTMENTS

Get more control over your financial life by choosing an investment that aligns with your goals. Our private investments bring you the opportunity to invest in short, mid or long-term investments.



THE REAL ESTATE ACCELERATION LOAN

Insured loans which are backed by real estate colatera

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THE CORE FUND

Cash Out Real Estate Fund through Tax Liens

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RENEWABLE ENERGY FUND

Low-risk, first position debts secured by a PPA.

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